Document Roles in PolicyTech:

Document Role	Description
Document Owner	A document owner has the following responsibilities for each owned document: - Create the document - Assign writers, proxy authors, reviewers, approvers, and readers - Assign departments and categories - Write the document content or assign another user to write it - Manage the document through the review and approval process, making revisions as necessary - As the document is periodically reviewed, create new versions and make necessary updates When necessary, a document owner can also do the following with an owned document: - Submit the draft document directly to approval if no reviewers are assigned - Set the document as approved if assigned the "approves own documents" role - Modify the assigned readers of published documents - Archive the document
Approves Own Document	This document role applies only to users assigned the document owner role. With the "approves own document" role assigned, a document owner can approve his or her own documents without having to go through the review and approval process. **Note:** If a document's template contains required reviewers or approvers, the document owner is not allowed to approve the document, even with the "approves own document" role assigned.
Writer	A document owner can assign any user with the writer role to write or collaborate in writing a document. A writer cannot, however, access or change any of the document's properties (assignments, roles, permissions, and so on). A writer can edit an assigned document for as long as it is in the draft status.
Reviewer	A document owner can assign any user with the reviewer role to review documents. A reviewer can accept an assigned document as is, revise it, or decline it. Those assigned the reviewer role are typically subject matter experts and managers.
Approver	A document owner can assign any user with the approver role to approve documents. An approver can accept an assigned document as is, revise it, or decline it. Because an approver is legally responsible for a document's contents, those assigned the Approver role are typically managers or company executives.

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Pending Documents	A user assigned the pending documents role can see documents that are approved but not yet published because of a pending publication date. Access is limited to documents the user would be able to see once the document is published.
Reader	A user assigned the reader role can see all published documents whose security is set to **All Users**.
Archived Documents	A user assigned the archived documents role can see archived documents. Access is limited to documents the user would be able to see if the document were in published status.
Template	A user assigned the template role can view, create, and edit document templates, but cannot delete them.
Proxy Author	The following list describes what a user assigned the proxy author role can and cannot do: - Can create documents for assigned document owners only - Can access and edit all draft documents for assigned document owners regardless of whether the documents were created by the proxy author or the document owner - Cannot submit a document for review or approval but can request that the document owner do so - Can view assigned document owners' documents through the review and approval process